

# Corporations, Chambers, and Charters: How Businesses Can Support High-Quality Public Charter Schools



Institute for a Competitive Workforce  
an Affiliate of the U.S. Chamber of Commerce



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Through its events, publications, and policy initiatives—and drawing upon the Chamber's extensive network of corporate members—ICW connects the best minds in American business with the most innovative thinkers in American education, helping them work together to ensure the nation's continued prosperity.



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# Introduction

*“We must understand that in the 21st century, the race for human talent will define the global winners and losers more than any other factor. America’s first priority must be to fully educate, train, and retrain our own people throughout their careers.”*

Thomas J. Donohue  
President and CEO, U.S. Chamber of Commerce



The availability of high-quality human talent is the number-one issue facing businesses today. Business leaders increasingly place improving public education at the top of their list of priorities because they believe the education system in the United States fails to produce graduates prepared to compete both locally and in a global economy. Consider the following:

- 1.2 million students drop out of high school every year.
- The United States ranks near the bottom in graduation rates among developed nations.
- Seventy percent of eighth-graders cannot read at grade level.
- In mathematics achievement, the United States ranks 25th out of 30 developed countries in the Organisation for Economic Cooperation and Development.
- Achievement gaps persist between students in low-income and high-income communities; nine-year-olds in low-income communities are already three grade levels behind their peers in high-income communities.
- Out of every 100 low-income students, fewer than 10 will ultimately graduate from college.<sup>1</sup>

At a time when many students are not graduating from high school prepared for postsecondary education and work, two-thirds of the new jobs being created require advanced training or a college education. Business leaders believe that high-quality education is paramount to America's ability to compete globally. Charter schools, as independently operated public schools, strike many business leaders as one of the most effective ways to have a tangible effect on pre-K through secondary education.

Charter schools began in 1991 with the passing of the nation's first charter law in Minnesota. Charter schools are independent schools designed to provide tuition-free public education choices for parents and students, liberate teachers and administrators from red tape, and allow more innovation in the classroom. In exchange for this flexibility, charter schools accept high accountability, knowing that they can be closed if they fail to live up to their charter.

Today, charter schooling remains one of the nation's most promising efforts to produce more great public schools. Charter schooling has developed a variety of school models that serve the different interests and learning styles of students, and has provided an opportunity to generate successful strategies that can be incorporated and replicated within districts. Of course, many districts reacted warily to the introduction of competition in their areas, but charters have now become a fixture of the public school landscape. Some charter school innovations—including extended learning time, small class and school size, and school-level teacher contracts—are finding their way into district settings. Other places have developed charter-district partnerships, co-locating charter schools with district schools or turning over failing district schools to charter organizations.

Forty states and the District of Columbia now have charter school laws, and about 4,300 schools serve 1.2 million students—about 2% of the public school population. Families continue to clamor for more charter schools, lining up on long wait lists to enroll their children.

Community	Charter Market Share
1. New Orleans, Louisiana	57%
2. Southfield, Michigan	27%
Dayton, Ohio	27%
District of Columbia	27%
3. Pontiac, Michigan	23%
Youngstown, Ohio	23%
4. Detroit, Michigan	20%
Kansas City, Missouri	20%
5. Toledo, Ohio	18%
6. Chula Vista, California	17%
Cleveland, Ohio	17%
Cincinnati, Ohio	17%
Milwaukee, Wisconsin	17%
7. Buffalo, New York	16%
Dearborn, Michigan	16%



## Learning More About Charter Schools

The National Alliance for Public Charter Schools ([www.publiccharters.org](http://www.publiccharters.org)) provides several resources about the state of the charter school sector and offers state-by-state contact information for organizations that are knowledgeable about the terrain.

In addition to the changes that charter schools can bring to public education, businesses involved with charter schools reap tangible benefits. In the short term, relationships between charter schools and corporations can provide meaningful volunteer opportunities for employees who feel they are a part of something that is making a difference. In the long term, charter schools—with their focus on results—have the potential to produce a better-prepared workforce.

Many charter schools across the country have moved to the forefront in educational achievement, and some are producing astonishing results with traditionally underserved groups of students. The most successful have served as models for new charter schools and, in some areas, spurred innovation in traditional district schools. Still, charter schools face many challenges:

- **Underfunding:** On average, charter schools receive 22% less per student than district-managed schools. Most states do not provide charter schools access to direct capital funding, resulting in charter leaders spending a portion of their operating funds on facilities. Only 15 states provide any support for charter school facilities, usually a minimal amount.
- **Varied access:** Some states do not permit charter schools, and the laws of many other

states hinder the growth of high-quality, truly independent charter schools by imposing arbitrary caps on the number of new schools.

- **Uneven quality:** The majority of studies that look at change over time find charter schools doing better than their district counterparts, but the quality of charter schools remains uneven. It has proven difficult for those who oversee charter schools to shut down unsuccessful schools.<sup>2</sup>

## What is a charter school?

### 1. An independent public school that—

- is operated by an independent organization (usually nonprofit);
- is nonsectarian and open to all students as a tuition-free school of choice; and
- receives public funding on a per-student basis.

### 2. A flexible public school that—

- gains freedom from certain laws and regulations, such as those concerning the control over budget and the ability to hire and fire personnel; and
- provides the ability to innovate with use of instructional time, such as longer school days, longer school years, and block scheduling.

### 3. An accountable public school that—

- is approved and overseen by an authorizer (or, in some states, a sponsor);
- administers the same tests as other public schools;
- agrees to a performance contract (or charter) specifying the results it must attain to keep its charter; and
- can be closed by its authorizer or sponsor if it fails to achieve results or violates legal or contract provisions.

- **Political opposition:** Although charter schools have gained bipartisan support nationally and in many states, they have also been the subject of fierce political opposition as the sector has grown.

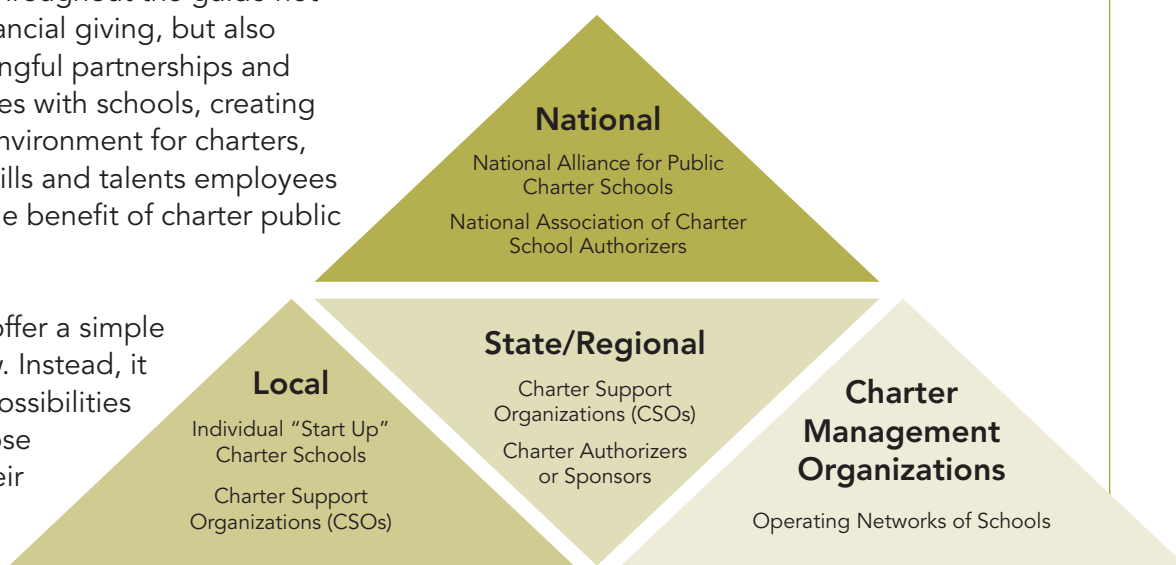
Given both the promise of charter schools and the urgent need to foster higher quality in the charter school sector, the U.S. Chamber of Commerce’s Institute for a Competitive Workforce commissioned this guide to outline how business can support charter schools. This guide captures recent developments in the charter sector and the advice of business leaders, leading donors, and partners on how businesspeople and chamber leaders can support high-quality charter schools, both in their local communities and on a national scale. Private philanthropy has been investing in the charter school movement from the beginning. This guide builds on the lessons philanthropists (including successful business leaders) have learned that will be particularly applicable to the business community.

Further, the guide provides real-world examples of how businesses and chambers of commerce have supported charter schools. Businesses will find information throughout the guide not only on corporate financial giving, but also on developing meaningful partnerships and volunteer opportunities with schools, creating a welcoming policy environment for charters, and leveraging the skills and talents employees already possess for the benefit of charter public education.

This guide does not offer a simple recipe for all to follow. Instead, it provides a menu of possibilities that readers can choose from and adapt to their own circumstances and capacity. It is

important to consider that although most charter schools are independent, stand-alone schools, the charter sector is a large and interconnected system. The figure below highlights a few key players in the charter sector: national support and advocacy organizations, state and regional support organizations and authorizers, individual charter schools, and charter management organizations that open schools under a brand. Your corporation or chamber can become involved in any part of the charter sector and should choose the area that will best leverage your resources.

Before we consider options for charter support strategies, an important caution must be given to business leaders seeking to support charter schools: **The charter school landscape differs vastly from state to state and from school to school.** New supporters, especially those who are targeting a specific city or state, must first take time to learn about this landscape. Business leaders must investigate the state’s charter law, if the state has one. Charter schools should be examined to ensure that the program has proven results or, if new, is based on sound research that increases the possibility of success.



## Why Charter Schools?

Businesses and chambers of commerce across the country have backed charter schools because of their potential to—

- surmount the barriers to change in traditional district schools;
- allow different work agreements between teachers and school leadership, including modified forms of union contracts and nonunionized arrangements;
- create opportunities for breakthrough approaches to educating young people, particularly low-income and minority students;
- provide diverse schooling options;
- bring more entrepreneurial leadership into public education;
- foster greater accountability for results;
- introduce competitive pressures for improvement into public education;
- empower parents and community organizations to shape children's education directly; and
- generate models that can be used in schools everywhere.

<sup>1</sup> Sources: ED in 08, [www.edin08.com/GetTheFacts](http://www.edin08.com/GetTheFacts); Teach for America, [www.teachforamerica.com/mission/greatest\\_injustice.htm](http://www.teachforamerica.com/mission/greatest_injustice.htm); Alliance for Excellent Education, [www.all4ed.org/files/IntlComp\\_FactSheet.pdf](http://www.all4ed.org/files/IntlComp_FactSheet.pdf).

<sup>2</sup> Source: Hassel, Bryan. What Do We Know About Charter Achievement? <http://www.publiccharters.org/content/publication/detail/1554/>.





# Five Ways

## Businesses Can Support Quality Charter Schools

Businesses want to be strategic, whether this means making financial contributions or forming partnerships in the charter school arena. They want to focus their time and resources on activities and organizations that can make a long-term difference for the success of schools that provide significant results for students. To help direct more strategic investments, we built this guide around a set of key priorities. Where can corporations and chambers target their resources to contribute as much as possible to a high-quality charter sector?

In our conversations with business, chamber, charter school, funding, and nonprofit leaders, we identified five ways businesses can support high-quality charter schools from the system level down to individual schools:

- **Build a robust supply of high-quality new schools.** The number of charter schools has grown tremendously since the first one opened in 1992, but demand continues to outpace availability. The business community

*The business community can work to develop enough new high-quality charter schools to fulfill the demand for better schooling options by starting new schools or helping established charter school brands expand.*

can work to develop enough new high-quality charter schools to fulfill the demand for better schooling options by starting new schools or helping established charter school brands expand.

- **Fuel the pipeline of human capital.** Charter schools rely heavily on the skills and talents of their board members to guide them. Boards select school leaders, hold leaders accountable for performance, and approve personnel policies. Supporting board development or volunteering on charter school boards to fulfill these areas of need are excellent opportunities for business leaders. As with all schools, strong principals and empowered teachers are critical to student success. Charter schools face shortages of highly effective teachers and leaders, especially those who are prepared to work in their unique environments. Corporations and chambers have an important role to play in the next several years to support the development of a vibrant pipeline of talented human capital for charter schools.
- **Address critical operational challenges.** Severe operational challenges have made it difficult for charter schools to start and thrive. Obtaining adequate back-office services, financing facilities, developing sound business and accountability plans, and managing contracts are some of the most prominent trouble spots. Businesses are often especially well-suited to provide these services to charter schools. Tackling these challenges would help more schools start and help existing schools focus on creating great learning programs.
- **Define and improve quality.** Just as American business has undergone its own quality revolution, charter supporters are

focusing more on building quality measures throughout the charter process—from new charter school development to authorization, from helping families choose quality schools to individual program support. Business leaders can have a significant impact on program quality at individual charter schools through strategic involvement, and by helping the movement to import quality standards and processes (e.g., the ISO 9000 process). Corporations and their employees can provide tutoring, mentoring, job shadowing, internships, volunteer labor, program enrichment, and corporate and individual donations that can enrich a charter school's program and help it fulfill its mission. In addition to supporting individual school quality, businesses can strengthen the organizations that provide and revoke charters (known as authorizers), as well as invest in the collection and dissemination of data on charter schools to families and the public to support informed school choice.

- **Forge charter-friendly public policies.** Charter school policy establishes the process and conditions under which all of a state's charter schools must operate. Yet in too many states, charter school policies hinder the potential effectiveness and the scale of the charter sector. In other states, good policies are under attack by charter opponents. Charter advocates are rarely as well organized or well funded as those who challenge charter schools. The policy arena continues to be a major factor in determining whether the charter school sector is able to capitalize on its successes and continue to grow with quality. Chambers are particularly well poised to have an impact in this area.

The heart of this report discusses these five areas where businesses can support charter schools.

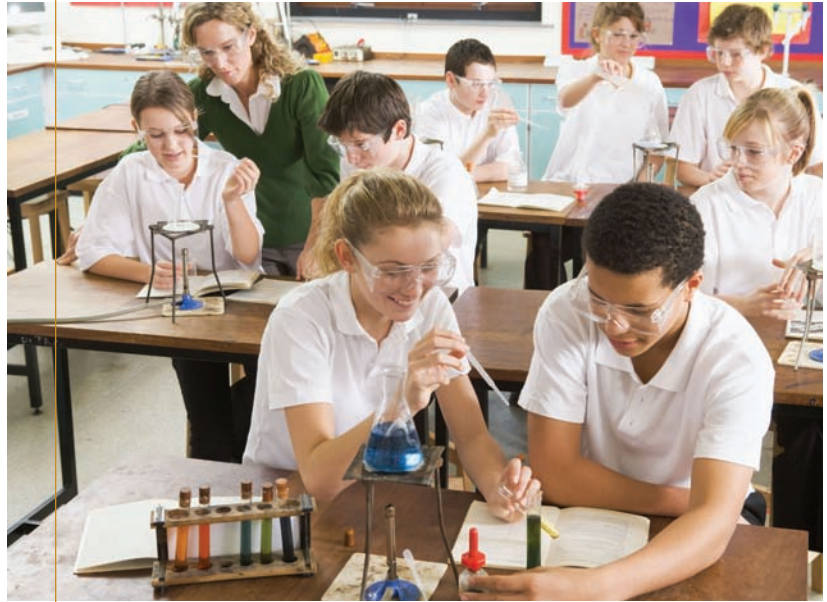
For each one, we describe the challenge in more detail and explain how business, chamber, and philanthropic leaders are working to address it. A final section pulls back for a broader view, offering general tips from these leaders on how businesses can make the most of their charter-related involvement. Finally, an appendix provides more information on charter schools and supporting organizations, as well as contact information for businesses, chambers, funders, and charter programs highlighted in this guide.



# Chapter 1:

## Building a Robust Supply of High-Quality New Schools

*We invest in replication because we believe it is the fastest way to scale with quality. But we know that every good replicated school started as an individual charter school. If they didn't receive support, we wouldn't have the next generation of replications.*



Every year, tens of thousands of families are on charter waiting lists. How can businesses and chambers help ensure that there will be enough new, quality charter schools to fulfill the great demand from parents for better schooling options for their children? How can businesses and chambers help build a charter sector that contributes to wider changes in public education?

For the charter sector to succeed, it needs a steady supply of new schools ready to provide an excellent education. As the charter sector has matured, two primary supply routes have grown up within it: opening individual new schools and replicating successful schools through charter school brands. Many businesses and funders have a strong bias in favor of one of these two methods: investing solely in brands to help achieve scale more rapidly or seeding only new individual schools to help foster greater innovation. No matter which option they choose, however, most of the people we spoke with feel strongly that both types of growth have important roles.

## Support for Individual Schools

As one funder explained, “We invest in replication because we believe it is the fastest way to scale with quality. But we know that every good replicated school started as an individual charter school. If they didn’t receive support, we wouldn’t have the next generation of replications.”

Individual, one-off charter schools embody the spirit of the entrepreneurial, accessible charter school movement and remain an important force in providing an innovative, high-quality education option. Corporations continue to play a vital role in both opening their own schools and aiding education entrepreneurs’ efforts to design and start new schools. All of the charter sector’s highly successful networks of schools began as single schools, and the future success of charter schooling will depend, in part, on continued innovation in new individual schools.

Business leaders can aid the development of new individual schools in many ways beyond monetary considerations. Serving on the board of a new charter school gives business leaders a unique opportunity to provide input into the design and execution of the school’s educational mission. Without that invaluable leadership, these fledgling schools may flounder, either by poorly targeting areas of need within the community or by viewing the problems through a narrow lens. Furthermore, these new schools can be an important economic development tool; having business leaders steer the formation of a new school that would help train students for careers in a specific field or industry can help stimulate long-term economic growth. Finally, encouraging employees to volunteer at the school can contribute to the school’s long-term success and help build community engagement in a student’s education, which can have a profoundly positive impact on at-risk students.

One example of a successful individual charter school initiative is the Franklin Academy in Wake Forest, NC. **Captive-Aire** CEO Bob Luddy founded the school as a personal endeavor, leveraging his business acumen and commitment to education to grow his school to its current K–12 program, serving 1,170 students with a 1,500-student wait list. As CEO, Luddy was able to make crucial decisions to involve his company in supporting the charter school. Captive-Aire served as loan guarantor for the school’s facility financing, as well as loaning executive time from the finance and human resources (HR) departments to put the school on a solid business footing and enable the academic program to flourish.

Another example is the Henry Ford Academy, a public charter high school in Dearborn, MI, that was created in 1997 by **Ford Motor Company Fund and The Henry Ford Museum**. Located on the campus of The Henry Ford Museum and Greenfield Village, the Academy is the nation’s first charter school developed jointly by a global corporation and a nonprofit cultural institution, in partnership with the local school district. The Ford Motor Company Fund provided \$6 million between 1996 and 2000 to support development of the school’s facility and core curriculum.

### **Action Steps: Support for Individual Schools**

- Serve on charter school boards.
- Encourage employees and peers to serve on charter school boards or volunteer at the school.
- Loan executive time for business functions of charter schools.
- Make start-up or expansion grants to charter schools.
- Provide a facility or loan guarantee to a charter school.
- Help launch a charter school that trains students for a specific field or industry.



## Support for Brands and Intermediaries

Although individual schools are critical to continued growth and innovation in the charter sector, it has become clear that the sector cannot rely solely on individual schools to reach the scale necessary to meet demand and to have a broader impact on public education. Some business leaders and funders also argue that stand-alone schools, as a group, are unlikely to produce the consistent quality needed to power a vibrant charter sector. In an effort to scale with quality, several business leaders and funders have invested in organizations that fall generally into two categories:

- **Brands:** organizations that seek to start multiple quality new schools with readily identifiable common features
- **Intermediaries:** organizations that aim to help multiply new high-quality schools, not necessarily linked under a common brand

### Brands

Most strong industries have one or more compelling brands. Consumers come to know a brand and what it signifies—certain characteristics, a given standard of quality. Brands are very useful in the marketplace. Not only do they give buyers valuable information, but they also create powerful incentives for their owners to maintain quality in order to keep brands strong. Furthermore, they can achieve economies of scale that make them more efficient than stand-alone shops. For these reasons—and based on the success of a handful of individual charter schools—the nation has seen the rise of a significant number of charter school brands in the past several years.

Several of these schools come under the umbrella of nonprofit charter management organizations (CMOs). These brands are tightly organized: their schools closely resemble each

other, they exert powerful quality control, and they operate many services centrally to achieve cost-effectiveness.

Many corporate leaders have immediately seen the potential power of charter school brands and invested in them, because these networks resemble other kinds of multisite businesses. One national brand that has received support from many businesses is the **Knowledge Is Power Program**, or KIPP. All KIPP schools subscribe to a set of principles called the five pillars. Their leaders come through a common training program, and the national KIPP organization provides individual schools with continuing support and monitors whether schools are implementing the five pillars faithfully. However, each school operates independently or as part of a regional CMO, like the ones that have formed in Houston and the District of Columbia. As of the fall of 2008, 66 KIPP schools were operating in 19 states and the District of Columbia, serving more than 16,000 students. School leaders from other countries, including Israel and the United Kingdom, are examining KIPP as a model they can adopt.

There are many opportunities for business leaders who want to see strong brands of schools proliferate. Corporate and philanthropic donors can contribute to the growing number of existing networks by providing support to bring one school from a network to a specific community or helping a community-based CMO grow to scale. For example, several donors contributed to an expansion campaign to replicate additional KIPP schools, including the **Bill & Melinda Gates Foundation**, the **Walton Family Foundation**, and the **Houston Endowment**. With foundation support over the next 10 years, KIPP plans to grow to 42 schools in Houston, serving 21,000 students in grades Pre-K through 12.

Companies can also act by providing funds for successful single-site schools to go to scale.

For example, **Perspectives Charter School**, a well-established Chicago charter school that produces a 91% graduation rate with a student population that is predominantly economically disadvantaged students of color, has been replicated with financial backing and planning assistance from several supporters, including **Motorola**. Motorola worked with Perspectives to develop a school with a math and science focus and has provided significant start-up funding. Eileen Sweeney of Motorola, who is involved with the charter school project, said, “We are about innovation, discovery, invention. We recognize that we need that next wave of American scientists, mathematicians, and inventors in place and this is one way we can do that. The school seemed like a great way to have a concentrated effort around this in our own backyard.” She also noted that the charter school was a natural outgrowth of Motorola’s larger commitment of supporting science and technology programs that seek to engage underrepresented populations in the science fields. Motorola hopes to broaden students’ knowledge about the career opportunities available in science, engineering, technology, and math. To further the relationship between the school and the real world, the Illinois Institute of Technology—in close proximity to the proposed location of another new Perspectives school—will expose students to the campus and to professional scientists. The Institute has also developed a teacher mentorship program that will foster working relationships between Institute scientists and mathematicians and Perspectives teachers.

As the charter sector has matured and experienced the rise of charter brands, corporations and funders have increasingly realized the importance of CMOs’ internal capacity to replicate schools successfully. Donors can also support replication of proven charter models by investing directly in CMOs. Donors have directly supported CMOs’ home offices

by providing grants that enable CMOs to build their organizations by employing senior staff members, hiring outside experts to help with business planning and other design work, or creating management structures for key systems such as data and assessment, HR, and finance.

### **Intermediaries**

In addition to directly supporting brands and their schools, donors have invested in charter growth intermediaries—venture philanthropy funds that provide financing and services to support the growth of high-quality charter schools. Intermediaries leverage numerous donors to contribute to scale not by creating more schools of their own, but by providing assistance so that many schools or groups can expand their models.

Two venture philanthropy funds, the **NewSchools Venture Fund** and the **Charter School Growth Fund** (CSGF), funnel a significant amount of philanthropic dollars to new and existing networks of charter schools. Both work specifically to develop and support promising networks of high-quality charter schools and apply a rigorous due-diligence process in selecting would-be CMOs. Promising candidates receive intensive early-stage support, and those that make good progress are eligible for increasingly larger grants. As CMOs operate more schools, CSGF and NewSchools expect that public revenues will replace philanthropy. But their initial capital aims to make it possible for CMOs to invest in quality and scale from the outset.

Other intermediaries focus on a specific geographic area. In every state with a charter law, at least one organization has formed to help people in the state start charter schools. Some of these organizations offer only limited support, but some have become incubators for new schools and are deeply involved with school

start-up. **New Schools for New Orleans (NSNO)**, for example, started after the public school system was devastated by Hurricane Katrina. When the city and state's school leadership decided to use chartering authority to reopen schools quickly, it created a significant need to recruit, train, and support charter school founders. Through its incubation program, NSNO recruits and selects new school founders to launch new and replicated schools in New Orleans, and provides extensive financial and operational support to help them prepare for opening day. NSNO provides \$10,000 a month for 10 months to founding leaders, as well as significant technical and networking assistance. The goal of the program is to ensure that new charter schools begin the academic year with well-planned academic programs and competent operational infrastructure in place. While the tragic circumstances of Hurricane Katrina created a unique environment for NSNO to achieve scale quickly, this example does demonstrate the effectiveness of an incubator system that provides centralized support to many charter schools.

By contributing to organizations that are building brands or enabling many schools to open, funders can boost the future supply of high-quality new schools. Yet once these new schools are open, they will face the same challenges that the first 4,000 charter schools have encountered. The next section discusses how corporations, chambers, and donors can address those challenges.

#### **Action Steps: Investments in Brands and Intermediaries**

- Make a grant to enable a brand to expand into your area.
- Make a grant to a brand's central offices to build their capacity to grow.
- Invest in a venture fund that backs the expansion of successful charter school networks.

- Serve on the board of a school network, or one of its schools.
- Make a grant to a city- or state-based charter school support organization.





## Chapter 2:

### Fueling the Pipeline of Human Capital

Whether a school is part of a network or a stand-alone charter, the school's board, teachers, and leadership are critical to its success. Yet like many traditional district schools, charter schools face shortages of highly effective teachers and leaders, especially those who are prepared to work in their unique environments. Several national initiatives are under way to help recruit, train, and support great leaders and teachers for the next generation of charter schools, and board development is a strategic focus of many charter supporters.

#### Charter Board Development

Charter school boards are the linchpin of successful schools. A charter board holds the charter for the school, sets the school's vision and policies, hires and oversees the principal, builds and monitors the school's financial health, and plans for the school's future growth and development. In short, without a strong board, a charter school cannot succeed.

Charter supporters in the corporate and philanthropic worlds noted that while several

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organizations focus specifically on recruiting and training teachers and leaders in charter schools, few offer specialized recruitment and ongoing training for charter school board members. They expressed hope that charter supporters could build a large, perhaps national, effort to build the capacity of these critical charter leaders.

Businesses can support the development of strong charter school boards in at least two specific ways. The first and most common is for businesspeople to serve on charter boards themselves, bringing their financial, legal, or other business skills to benefit the school. A diverse board that represents the community and includes members from varied backgrounds, work experiences, and skills can ensure that the school is prepared for the challenges it faces. Further, board membership can strengthen a partnership between a corporation and a charter school. **Charter School of Wilmington** (Delaware), for example, has always had a rich relationship with six area science and technology-related corporations: **AstraZeneca**, **Christiana Care**, **Connectiv**, **DuPont**, **Hercules**, and **Verizon**. In addition to providing program enrichment, the relationship ensures that employees of each company sit on the board and bring their business expertise to bear on the school's challenges.

Another example of active involvement by a business leader in a charter school is the **Carl C. Icahn Charter School** in the South Bronx, New York. Billionaire corporate investor Carl Icahn's **Foundation for a Greater Opportunity** founded the school, and Icahn serves as the president of the charter school board. His focus on quality helped more than 97% of Icahn students (all of whom are children of color and 90% of whom qualify for free or reduced-price lunch) achieve proficient or advanced levels in mathematics on the 2006–07 state exam. The Foundation for a Greater Opportunity also supports replication,

having opened a second school and obtained approval to open a third. Icahn's foundation plans to open six schools over the next six years.

In addition to serving directly on a board, business leaders can provide supplemental services or give grants that enable a board to run a school more effectively. **Textron Inc.** in Providence, Rhode Island, provided grants to the **Textron/Chamber of Commerce School** to bring in an outside strategic planner and a fund consultant to help put the school on sure footing for the future.

#### **Action Steps: Charter Board Development**

- Serve on charter school boards.
- Encourage employees and peers to serve on charter school boards or volunteer at the school.
- Fund a school to bring in outside board development assistance.

#### **New School Leaders**

In the business world, it is often said that you never see a successful business without a strong CEO. The same can be said of successful schools; they rely on strong leadership to guide them effectively. Surveys of teachers routinely rate the quality of leadership as one of the most important conditions that affect their willingness to remain at a school.<sup>3</sup> Providing well-prepared leaders to new charter schools, then, can improve the schools' chances for success through both effective leadership and improved teacher retention. Several programs have developed on the local and national levels to address the growing shortage of talented school leaders.

One example is the **KIPP Fisher Fellowship**, which trains outstanding educators to lead a charter school within the KIPP network. With support from Doris and Donald Fisher, co-founders of Gap, Inc., and others, the yearlong training program offers intensive coursework at New York University and



a residency period in a high-performing KIPP school. Since 2000, KIPP has trained more than 60 principals to open KIPP schools in 19 states and the District of Columbia.

#### **Action Steps: New School Leaders**

- Mentor a charter school leader.
- Make a grant to an organization which recruits and trains school leaders.
- Sponsor an individual to go through a charter school leadership program.

### **Outstanding Teachers**

Several organizations have entered the charter field or expanded their mission to help build the pipeline of teachers and ensure that they are prepared to be effective in charter schools. **Teach for America** (TFA) is a national corps of recent college graduates and professionals who commit to teach for two years in public schools. TFA has moved increasingly into the charter realm in the past several years, largely based on philanthropic support. TFA's work in New Orleans is one recent example. Though the organization sponsored corps members in New Orleans prior to Katrina, after the hurricane it increased its recruitment efforts with support from many donors, including the **Eli and Edythe Broad Foundation**, the **Doris and Donald Fisher Fund**, the **Bill & Melinda Gates Foundation**, and the **Greater New Orleans Foundation** to address the urgent need for new teacher talent in New Orleans public schools (most of which are charter schools). These funders have also supported **teachNOLA**, a cooperative effort by the **New Teacher Project**, **New Schools for New Orleans**, and the state Recovery School District to recruit, train, and certify teachers in New Orleans public schools.

Several charter school networks have initiated the creation of graduate schools of education to prepare teachers for charter schools. These charter-focused programs employ a training model that focuses heavily on classroom

experience, allowing candidates to work in local charter schools while earning their degree. They help meet a need that nearby traditional teacher preparation programs may not—rigorous training that targets the values and elements of instruction that are most important for the sponsoring networks of schools.

Most traditional graduate schools of education have not redesigned their programs to prepare teachers for the challenges that they face, particularly in urban schools. To respond to this shortfall, the charter school network **High Tech High** (HTH) opened its own state-approved graduate school of education in September 2007 in San Diego. The program offers a master of education degree with two concentrations: school leadership, for individuals who wish to lead a small innovative school; and teacher leadership, for experienced teachers who want to deepen their practice and broaden their leadership capacity. Tuition is subsidized for graduate students, who learn and work alongside HTH teachers and administrators in the HTH school network. Just over \$3 million in initial support for development of the program was provided by the **Amar Foundation**, the **Ronald Simon Family Foundation**, and the **James Irvine Foundation**.

Businesses are involved in a number of efforts to mitigate the critical teacher shortages across the country. **IBM**, for example, has created a Transition to Teaching program, which provides significant support to seasoned IBM employees who are leaving the company and want to earn teaching credentials in math and science.

Other large corporations could adopt similar programs and encourage their employees to consider teaching at charter schools as well as district schools.

### Action Steps: Outstanding Teachers

- Make a grant to an organization that recruits or trains teachers for charter schools.
- Encourage seasoned employees to enter teaching.

### Other Human Capital Needs

As the charter sector has matured and seen a significant increase in the number of Charter Management Organizations (CMOs), funders have increasingly realized the importance of CMOs' leadership capacity in their ability to replicate schools. Several foundations are working to support and foster new and innovative leaders within CMO home offices.

The **Eli and Edythe Broad Foundation**—founded by real-estate and finance leader Eli Broad—sponsors the **Broad Residency in Urban Education**, a management development program for business, public policy, and legal professionals who wish to work in an urban school setting. These residents work in senior management positions at the CMO while participating in two years of professional development. Recently, Broad has begun to direct several of its residents to leadership positions in CMOs, including **Aspire Public Schools**, **Green Dot Public Schools**, **Uncommon Schools**, and **Victory Schools**. One-third of the class of 2007–09 was placed in CMOs.

Similarly, the **Charter School Growth Fund** (CSGF) provides a C-level initiative aimed at creating networking opportunities in select cities for a combination of professionals who work in management roles (e.g., CEO, COO, CFO) in nonprofit charter management organizations and business professionals who are interested in CMO work and could become future board members or C-level hires. CSGF sponsors regular meetings for these professionals to network and

attend educational programs, as well as an annual national gathering.

### New Thinking about Labor-Management Relations

Charter schools have also been the site of considerable innovation in labor-management relations because of their freedom from conventional policies and collective bargaining arrangements. Most charter schools are non-union, but some have pioneered innovative teacher contracts that offer new models of collective bargaining for schools.

**Green Dot Public Schools** is a nonprofit network of 10 charter schools in Los Angeles. Green Dot's teachers are unionized and hold a streamlined contract with valued job protections, such as the right to due process before dismissal, but without many of the work rule restrictions that make it difficult to pursue good teaching practices in the traditional public school setting. Green Dot also partnered with the **United Federation of Teachers** (UFT) in New York City to open a charter school in the South Bronx with a similar teacher contract. In addition, UFT has opened two charter schools of its own in New York City.

Charter schooling may also be contributing to the new thinking about how district school teachers negotiate their working situations to adopt policies that charter schools currently possess. In Denver, for example, teachers at Bruce Randolph School and Manual High School mobilized to request a waiver from their union's collective bargaining agreement in order to renegotiate directly with their school leadership and enact necessary school reforms, including extending the school year, reallocating teacher time during the school day, and hiring teachers outside the district transfer rules—common charter freedoms.

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<sup>3</sup> Source: Center for Teaching Quality, <http://www.teachingquality.org/twc/whatweknow.htm>.



## Chapter 3:

### Addressing Critical Operational Challenges

Autonomy is a hallmark of the charter school concept. Operating independent of state and district bureaucracies, a charter school can forge a coherent mission and align all of its activities with that purpose. That autonomy, however, comes at a price. The more independently a charter school operates, the more it is cut off from the supports offered by the district's central administration system. For district schools, having a facility is a given. The central office handles back-office services like finance, accounting, and HR. Governance is centralized as well, through the district board of education.

Few charter schools would trade their freedom for these services, many of which may not meet their particular needs. The lack of support, however, creates severe operational challenges that can hamper charter schools' ability to function effectively. Consider the following:

- Most charter schools spend some portion of their operating funds on facilities—

*The central office handles back-office services like finance, accounting, and HR. Governance is centralized as well, through the district board of education.*

money that they could certainly use for instruction.

- Charter school leaders spend an extraordinary amount of time dealing with back-office issues, from transportation to financial reporting to building maintenance.
- Special education requirements that apply to public schools also apply to charter schools, pulling charters into the expensive and complex regulatory world related to children with disabilities.

Though the landscape of support organizations to address these challenges has improved significantly in the past several years, these issues continue to divert the attention of charter school leaders from their most important work—classroom instruction. These concerns may initially appear tangential to a school’s educational mission, but they can have a tremendous impact on teaching and learning.

These barriers also discourage entrepreneurs from stepping into the arena by making the prospect of operating charter schools less attractive. This disincentive applies to individuals and grassroots groups who want to start stand-alone schools, but it also applies to charter school networks or brands. These operational obstacles tip the scales against many organizations that have the potential to scale up a network of schools.

By addressing operational challenges, corporations, chambers, and philanthropists can achieve dual purposes: improving the effectiveness of existing schools and helping to prime the supply pump.

## The Role of Charter Support Organizations

Although some charter schools are overseen by a charter management organization (CMO), the

vast majority are stand-alone programs that must identify sources of supports and services for all of their operational needs. Charter advocates in most states have developed charter support organizations (CSOs) to address the operational challenges charters face by providing access to information in resource centers or developing member associations that can provide or leverage access to services (see the Resources section for a link to a list of such organizations).

CSOs often provide individualized technical assistance by answering specific questions or connecting a school with resources on a range of issues (e.g., facilities, accounting, legal compliance, professional development, assessment). They also offer newsletters and other publications, Web sites, workshops, and conferences on the same topics. For many charters, access to a strong CSO in their state has meant the difference between struggling and thriving. Examples of well-organized CSOs include **California Charter Schools Association**, **Colorado League of Charter Schools**, **New York City Center for Charter School Excellence**, **New York Charter School Association**, and **Michigan Association of Public School Academies**. For corporations seeking to support chartering on a broader scale by assisting the development of a support infrastructure, charter support organizations provide a key opportunity for business partnerships.

In addition to CSOs, some organizations have worked independently to build specific components of the charter support infrastructure to aid in the acquisition of school facilities, back-office services, and technical assistance in delivering special education.

## Facilities Financing and Development

Financing facilities regularly tops the list of tough issues facing charter schools. For starters, real

estate is expensive, especially in view of the costs of retrofitting a building for use by a school. Affordable financing is especially hard for charter schools to find. As they can go out of business or be shut down for poor performance, they are a riskier bet for lenders and investors. Exacerbating the risk is the fact that charter schools are often start-ups, with little experience in real estate. Financiers charge a premium to cover these risks, and charter schools end up paying more than a school district would for financing.

The facility financing sector for charter schools has improved in recent years. According to a report from the **Local Initiatives Support Corporation**, in 2007, 25 private, nonprofit organizations provided financing to charter schools for their facilities, together contributing more than \$600 million in direct financial support to date.

Many argue that the long-term solution to the facilities challenge lies in changing public policy to place charter schools on more equal footing with traditional districts, a subject taken up in a later section. Absent those changes, what can businesses do to help? Two broad strategies have emerged:

- **Support for individual school facilities**, perhaps the most direct form of assistance. It may take the form of a donated facility, a low-cost lease for a building, or direct grants to a school's capital campaign.

Direct investments may also take the form of loans or loan guarantees. To make charter schools a more attractive bet for lenders and investors, several donors use foundation funds as a guarantee backing up one or more charter schools' debts. By placing funds into a reserve account or simply signing a guarantee letter, funders can provide lenders with some security; if a school cannot repay

its debt, the donor's funds are available to make payments. This kind of assistance is known as credit enhancement because it boosts schools' standing in the financial marketplace. Foundations have sometimes used grant funds to set up these guarantees.

- **Support through an intermediary** that specializes in facilities financing or development for charter schools. Numerous organizations have sprung up around the country to provide facilities financing assistance, many with significant philanthropic funding. Several intermediaries have also received grants through the U.S. Department of Education's Credit Enhancement Program, including the following:
  - America's Charter (now part of Building Hope)
  - Center for Community Self-Help
  - Charter Schools Development Corporation
  - Community Loan Fund of New Jersey, Inc.
  - Illinois Facilities Fund
  - Local Initiatives Support Corporation
  - Low Income Investment Fund
  - Raza Development Fund
  - The Housing Partnership Network, Inc.
  - The Reinvestment Fund

Another type of facilities assistance comes through development intermediaries, which find, renovate, and lease buildings to charter schools. This type of intermediary helps with financing by securing better terms than a new charter school could; it also takes the facilities burden off of the school's staff and board, freeing them to focus on issues other than bricks and mortar. Examples of this type of intermediary organization include **Civic Builders** in New York, **Pacific Charter School Development** in California, and **EdBuild** in the District of Columbia.

Businesses may also help alleviate charter school facility needs on an as-needed basis.



Boston Renaissance Charter Public School has developed relationships with the nearby law offices of **Holland & Knight** and the **Boston Park Plaza Hotel**. Holland & Knight donates occasional use of its board room for teacher professional development. The Plaza allows the school to use its ballroom for middle-school graduation ceremonies. Such flexible arrangements relieve the school of the need to maintain larger facilities and are an inexpensive way for businesses to support local charter schools.

### **Action Steps: Facilities Financing and Development**

- Donate a facility to a charter school, or lease space on favorable terms.
- Contribute to a charter school's capital campaign.
- Cosign or guarantee a charter school's facility loan.
- Make a grant or low-interest loan to an intermediary that helps charter schools with facilities financing.
- Enlist your company's facilities managers to assist a charter school.
- Allow charter schools to use your company's facilities (e.g., board room, auditorium) as needed.

Back-Office Services and Special Education Teaching and learning take center stage in schools. Behind the scenes, back-office activities are essential to make the teaching and learning operation run smoothly. Financial management—accounting, payroll, reporting, and the like—is one important area. Other areas include information management, food service, and transportation. Charter schools either have to provide these services themselves, through staff, or find outside vendors. The former saps valuable time and energy, while the latter involves the highly fragmented and often spotty vendor market, leaving no easy solution.

Businesses are often uniquely suited to help charter schools meet back-office service challenges directly. For example, the **Sullivan & Worcester** law firm in Boston provides pro bono legal services to Neighborhood House Charter School in the areas of corporate, tax, and real-estate law. **Captive-Aire** loans a significant portion of its HR manager's and chief financial officer's time to Franklin Academy. A team of **Textron's** Six Sigma "black belts"—quality improvement professionals—volunteered with Textron/Chamber of Commerce School to help administrators and leadership improve the efficiency of their school processes. These businesses can leverage their existing skills and resources to make it easier for schools to focus on their educational program.

Many businesses have also found that their employees appreciate having significant volunteer opportunities with charter schools. They feel good about their company supporting public education and using their skills to further those efforts. Because charter schools are independent nonprofit organizations as well as schools, there are always opportunities for corporations and business leaders to support charters. Carol Matthews, chief operating officer of **Beginning with Children Foundation**, noted, "From providing mentors to volunteering space, every profession has an opportunity to participate in the education of our youth."

In addition to these direct supports, corporations can provide technical assistance and training in areas they see as needs among their school grantees. At the **Tiger Foundation**, founded by Julian H. Robertson Jr., chairman of Tiger Management, LLC, leaders learned that several of their grantees struggled with finances and allocating costs across multiple program areas. The foundation organized a grantee-wide technical assistance initiative around financial management, with targeted one-on-one follow-

up. According to a case study of the initiative by the Bridgespan Group, a national management consulting firm specializing in nonprofit clients, Tiger subsidized most of this technical assistance, though it did require grantees to contribute a portion of the costs to ensure that the services were valued.

Another route is to fund organizations that specialize in providing services to charter schools. Some of these, like the **New York City Center for Charter School Excellence**, provide assistance to charter schools across a wide variety of topics. The NYC Center was launched in 2004 as a unique public-private partnership founded by the New York City Department of Education and a group of foundations including the **Robertson Foundation**, the **Robin Hood Foundation**, the **Pumpkin Foundation**, and the **Clark Foundation**, with the backing of New York City Schools Chancellor Joel Klein. The Center works to stimulate the supply of high-quality charter schools in New York City and to support operating charter schools with leadership development, performance data management, facilities support, and technical assistance with issues that arise in day-to-day operations. Similar associations and resource centers exist for charter schools in almost every state, though not all offer services as thorough and wide-ranging as these.

Other charter support organizations specialize in providing particular types of assistance. The **Innovative Schools Development Corporation** (ISDC), for example, provides facilities planning and financing, operations and financial management, and information on best practices in charter schools in Delaware. ISDC was funded in 2002 by the **Rodel Foundation of Delaware**, but it has grown to become nearly self-sufficient financially through the fees it collects from schools. ISDC plans to begin offering its services to surrounding states and bring best practices from those states back to serve Delaware.

## Special Education

As public schools, charter schools are open to all, including students with disabilities. Many charter schools were explicitly formed to educate students with special needs; others have found that large numbers of such children seek them out because of dissatisfaction with existing schools. On top of the educational complexities of meeting a variety of students' needs, special education also demands an intense focus on compliance with the maze of federal and state laws. Special education costs can be high and legal risks great.

One way philanthropy has addressed this challenge is by helping schools form special education cooperatives to ensure that they are providing an excellent education to students with disabilities and complying with applicable requirements. The **Annie E. Casey Foundation**, for example, provided early funding for the **District of Columbia Charter School Special Education Cooperative**. Through the cooperative, schools have access to special-education-related professional development and technical assistance, and can share staff and enter into favorable arrangements with special education contractors. They are also working together to develop a system through which schools can obtain reimbursement for significant costs through Medicaid.

All of these developments have the potential to help schools meet their operational challenges. But for these services to work, charter schools need to seek them out. Whether or not they do so depends in part on the degree to which the schools' environment demands quality from them. Creating that kind of environment is a fourth way corporations can support the development of a stronger charter sector.

**Action Steps: Back-Office Services and Special Education**

- Provide pro bono back-office services (e.g., accounting, legal) directly to a charter school.
- Loan your executives to assist a charter school with management systems.
- Include a charter school in purchasing discounts you receive from vendors.
- Make a grant to an organization that helps charter schools with back-office services or special education.





## Chapter 4:

### Defining and Improving Quality

In theory, charter schools' environment drives them toward quality. Charter school authorizers—the agencies that grant charters and hold schools accountable—are responsible for screening out poorly prepared applicants, overseeing schools, and closing schools that do not measure up. Families, through their ability to vote with their feet, are also able to demand excellence from the schools their children attend.

However, after inconsistent responses to failing charter schools in the sector's first decade, experience has shown that these features alone are not sufficient to ensure consistent quality. Nearly everyone we talked with expressed concerns that the charter environment in general—and business, philanthropic, and nonprofit supporters of charters in particular—must be much more intent on quality. Businesses can support quality directly by partnering with charter schools to provide programs that can contribute to student success. In addition to direct support, part of the task of improving school quality involves improving the authorizing process. Supporters and funders can also help

*Businesses can support quality directly by partnering with charter schools to provide programs that can contribute to student success.*

directly by establishing measures and standards of quality for their own school and CMO grantees. Corporate and philanthropic support also plays a role in recognizing the schools that are realizing outstanding results and shining a light on those that are not by investing in the collection and dissemination of data and research on charter schools.

## Enhancing School Programs

Charter schools face an enormous challenge: to provide a rich educational experience to traditionally underserved students with fewer dollars than districts schools. Yet because of these challenges, charter schools have reached out to corporate, philanthropic, and nonprofit organizations to bolster their programs. Business partners can develop meaningful, close relationships with charter schools through corporate giving and volunteer efforts, many of which can have a significant impact on student performance. Bruce Connery of **El Paso Corporation**, a natural gas company, noted that “the combination of charitable giving with volunteerism is a much more powerful model” than just giving money to a school. “Those employees who choose to volunteer through our program with KIPP recognize that all of these kids are going to graduate and nearly all will head to college...the volunteers feel like they are part of that success.”

When working directly with a charter school, it is important to carefully consider the purpose of the volunteer effort or support and how best to execute the program. Jessica Dugan, the director of community partnerships at **Boston Renaissance Charter Public School**, coordinates volunteers and supports from more than 50 area businesses to align corporate support efforts and her school’s needs. Too often, she noted, creating poorly planned volunteer opportunities at schools can cause more stress

and work than benefit for the teachers, students, or administrators. Furthermore, corporate volunteers want meaningful experiences that will have an impact. Dugan noted that a school/community liaison can fill a niche by navigating the different communication styles of schools and businesses, developing highly purposeful interactions and volunteer opportunities, and ensuring that both sides benefit from the relationship. She suggested that corporate funding of a community partnerships coordinator—perhaps working with a group of charter schools—would be a good investment of resources and foster more meaningful and better established corporate and school relationships.

### **Action Steps: Enhancing School Programs**

- Be a strong voice as a charter board member or donor for high quality and continuous improvement.
- Mobilize your employees to volunteer in meaningful ways at a charter school.
- Provide internships, tutors, and mentors for charter school students.
- Donate company funds and encourage employee donations to pay for enrichment activities at a charter school.
- Bring your company’s technical expertise to a charter school via guest teaching, helping establish science labs, and so on.

## Improved Authorizing

In addition to supporting existing charter schools, businesses and philanthropic investors can support the development of more quality charters by strengthening charter authorizers. Every state’s charter law appoints one or more bodies to serve as charter school authorizers. Depending on state law, authorizers may be local boards of education, state boards of education, university boards of trustees, mayors, city councils, nonprofit organizations, or special-purpose entities created specifically for this role.



If authorizers do their jobs well, they contribute to quality in the charter sector on the front end (allowing only qualified applicants to open schools) and the back end (taking action when schools perform badly). If they do their jobs poorly, quality can suffer.

In 2003, the **Thomas B. Fordham Institute** conducted a nationwide study of authorizers (*Charter School Authorizing: Are States Making the Grade?*). Although the report found that “most major authorizers are doing an adequate job,” no state received a grade higher than B+. The study also pointed to numerous shortcomings in how well states support authorizers and how authorizers perform. The **National Charter School Research Project**, with funding from several foundations, published a report titled **Holding Charter Authorizers Accountable: Why It Is Important and How It Might Be Done** to examine the causes and consequences of poor authorizing and explore how the problem might be fixed. These studies are examples of one way funders and corporations can help improve authorizing: by shedding light on authorizing policies and practices. Funders have pursued strategies at both the national and local levels.

Several donors have supported the **National Association of Charter School Authorizers** (NACSA), an organization whose members oversee well over half of the nation’s charter schools as of winter 2007. NACSA holds a national conference for authorizers, promulgates “principles and standards of quality authorizing,” conducts trainings for them on specific issues, provides in-depth assistance to particular authorizers, disseminates information about authorizing, and speaks for its members in policy circles.

In Indianapolis, the **Annie E. Casey Foundation** provided multiyear support to help then **Mayor Bart Peterson** develop a top-notch authorizing

system. The grants enabled the mayor’s office to invest up front in the design of a rigorous application process, a thorough results-based accountability system, and a Web-based source of information to families about all public schools in Indianapolis. The office is now completely funded through public dollars. The **Doris & Donald Fisher Fund** provided funds to NACSA to help California’s authorizers improve the processes they use to vet applications and develop rigorous and meaningful performance contracts with their schools. In the District of Columbia, the public charter school board uses teams from the **Service Corps of Retired Executives, DC Chapter**, to review charter school business plans for preapproval.

### Collecting and Disseminating Data and Research on Charter Schools

Even as donors have supported the improvement of authorizing, many have asked: Who holds the authorizers accountable? What if authorizers are approving shoddy applications or falling short in their accountability duties? Raising awareness about charter school performance can both hold authorizers more accountable and better inform families about school performance so they can make wiser school choices. Realizing that some authorizers are not providing the needed focus on quality, some funders have also supported third-party information providers who make data available on school performance but are not tied to an authorizer or school. Some of these providers, such as **GreatSchools.net** and its Web site **CharterSchoolRatings.org** (both with numerous funders), include information on all public schools and specifically on charter schools. Funders can contribute to national efforts like these, or fund local or state initiatives to provide information—like **Connecticut Coalition for Achievement Now’s** (ConnCAN) report cards on all public schools in Connecticut, including charter schools.

Nationally, information technology and growth modeling of student academic performance have matured significantly, offering new types of information on public school performance that have never been available before. Amid these changes, efforts also have increased to gather and disseminate information about charter schools, their students' performance, and the conditions that contribute to their success. Today, many charter-related research projects are under way. The list below provides just a sample:

- Several charter backers have supported the **National Charter School Research Project** at the University of Washington's Center on Reinventing Public Education. Recent reports from the project include **Quantity Counts: The Growth of Charter School Management Organizations**; **Inside Charter Schools: A Systematic Look at Our Nation's Charter Schools**; and 2005 and 2006 editions of **Hopes, Fears, & Reality: A Balanced Look at American Charter Schools**.
- The **Walton Family Foundation** has supported a major charter school data collection and analysis project at the Hoover Institution's **Center for Research on Education Outcomes** (CREDO). This initiative has become linked with an initiative that includes the **National Alliance for Public Charter Schools**, the **National Association of Charter School Authorizers**, and the **Colorado League of Charter Schools** to define a set of performance measures to guide chartering over time.
- The **Annie E. Casey Foundation** has funded a series of reports by the **Progressive Policy Institute** and the nonpartisan think tank **Education Sector** examining states' experiences with charter schooling and the role of state charter laws in shaping the health of their charter school sector. It has also funded a recent report that analyzes findings across the series to make

recommendations for how states can improve their charter laws and the policies that govern their operations.

## Definitions and Standards of Quality

In the early days, the focus of charter advocates—and many funders—was on rapidly expanding the number of schools. Expansion is still a priority for most donors, but increasingly funders are demanding that the schools and networks they fund achieve substantial results. In fact, several of the corporate and philanthropic charter supporters we talked with expressed urgency around defining and insisting on quality. A few organizations have stepped into this arena directly by establishing their own clear measures and standards of quality for their grantees, and by helping those schools and CMOs in turn hold themselves accountable for results. As one funder explained, "We strongly believe that we must require charters to demonstrate much more clearly that they are producing significantly better academic results for students. If they can't demonstrate this, they will continue to be vulnerable to politics, unions, and parents."

**Prudential Financial** encourages charter school quality by focusing its financing efforts on the most promising charter schools and proven existing programs. The **California Charter Schools Association** assists Prudential by evaluating the quality of its members who have access to Prudential financing through the Association. John Kinghorn of Prudential Social Investments notes, "Some charter schools are better than others. It is not enough to just provide money. We must support quality public education in the process." Prudential has learned that several key individuals and charter organizations have proven ability to deliver quality, and Kinghorn believes that "companies should generously provide resources to remove roadblocks from their expansion."

**Civic Builders** builds student performance requirements into its leases. Civic Builders owns or holds the lease on its facilities and offers its charter tenants rent rates that are well below market. In return for the favorable rates, the schools must maintain a certain level of academic achievement or face eviction. Brian Olson, the corporate investor who chairs the board of Civic Builders, said that it has not had to evict any school for poor performance but noted that the quality/performance clause in the lease “gave us a seat at the table” to help at least one school identify and rectify areas of weakness before they led to school failure.

One of the main goals of the **Michael & Susan Dell Foundation’s** (MSDF) charter investment portfolio is to give schools the means to track their performance and respond to it as necessary. Through performance management grants, the foundation works with the schools and CMOs it invests in to help them develop mission-specific goals and support the development of processes that will allow the CMO to develop action plans based on the data they collect. To help track the performance of its own charter grantees, the foundation has developed an internal outcomes reporting database that consolidates all of the data about its schools’ performance in one place.

The **MSDF** has also provided \$3 million over four years to the **California Charter Schools Association** to support California charter schools in their collection and analysis of data through a contract with a data management organization. Based on a pilot in 30 Los Angeles charter schools, the initiative will eventually roll out across the state.

### ***Action Steps: Improved Authorizing, Research, and Standards***

- Make a grant to an authorizing agency or association to increase the quality of authorizing in your area.
- Set a high quality bar when deciding whether to support a charter school.
- Insist on rigorous evaluation of any charter school you support.
- Make a grant to a research organization or university to conduct an informative study of charter schooling.



# Chapter 5:

## Forging Charter-Friendly Public Policies

*If state laws do not allow chartering at all, tightly restrict the number of charter schools or authorizers, or impose undue regulation or inadequate funding on the schools, then supporters and funders will fail to build scale with quality.*



Even 16 years into the charter schooling movement, opposition to charter schools continues to be well organized, well established, and vocal. It has become clear across the country that all the support and investment discussed in the previous chapters can succeed only if states adopt public policies that support chartering. If state laws do not allow chartering at all, tightly restrict the number of charter schools or authorizers, or impose undue regulation or inadequate funding on the schools, then supporters and funders will fail to build scale with quality. Without a critical mass of high-performing charter schools, the charter school sector's influence on students, and on public education, will be minimal.

Business leaders recognize the central importance of charter school laws in allowing school choice and competition in public education. Many business leaders have increasingly sought to educate policymakers and the public about the kinds of policies necessary for the charter sector to thrive.

In addition to directly advocating for charters, businesses can build or support organizations

with the capacity to conduct effective advocacy. Opposition to charter schools tends to emanate from savvy, well-funded organizations with years of experience, grassroots support, and strong connections to elected officials. These organizations not only seek measures that restrict the freedom and innovativeness of charter schools—such as mandatory union participation for teachers and requirements of a certain number of minutes of seat time for students in each subject—but they also attack the very existence of charter schools by claiming that charters are unconstitutional or fighting to freeze the number of charters well below the established cap. Unless a compelling message opposes these restrictions, anti-charter forces will be the only voice reaching the ears of legislators.

Several of the charter supporters we talked with agreed that one natural way to bolster the charter sector against opposition is to shine a spotlight on its successes. In addition, corporations can foster policy environments that are conducive to charter schools' success in two more direct ways. First, they can support 501(c)3 nonprofits that build grassroots support and engage in advocacy work on a broader scale, including some degree of direct lobbying. Several examples are included below. Second, individual donors and corporations (as opposed to foundations) are free to support charter school advocacy through contributions to candidates, political action committees, extensive lobbying, and so forth. Examples of this sort of contribution are harder to come by. A good bet for those interested in making such donations would be to contact other funders and the state charter school organization to learn about opportunities for this kind of giving.

### **Building Grassroots Support**

Families, especially families in poor communities, are often the most vigorous advocates of

expanded school choice and chartering. Funders have seen the need to organize this grassroots support effectively and have provided funds to organizations seeking to do so. Two successful examples are the **Center for School Change** and **Harlem Parents United**.

The **Center for School Change** developed a guide to public charter school choices in the Minneapolis–St. Paul area. The 2008 Charter Public Schools brochure collects information about 60 public charter schools in the Minneapolis–St. Paul area to ensure that parents are aware of the educational options available to their children. The guide is distributed with the help of small businesses, including real estate agents, beauty shops, and coffee shops; and through direct mailing. The guide is also distributed in every public library in the Minneapolis–St. Paul area.

**Harlem Parents United** is devoted to improving education in all public schools in this New York City community by harnessing parental support and advocacy. Eva Moskowitz, founder of the new Harlem-based CMO **Success Charter Network** and former education chair on the New York City Council, is leading this effort. Charter schools are now educating about 25% of public school students in Harlem.

### **Supporting State-Level Organizations That Advocate for Strong Charter Policies**

As most charter policies are set by state legislatures, every state with a charter law (and many of those without one) has at least one statewide organization dedicated to educating policymakers and the public about the need for stronger charter policies. Some of these organizations are membership-based, and known as charter school associations or leagues. Others are independent nonprofits governed



by business and community leaders, parents, and others.

Over the years, these organizations have successfully led efforts to—

- lift or eliminate caps on the number of charter schools allowed in a state;
- expand the range of bodies that can authorize schools in a state;
- increase funding for charter schools, or open up access to facilities financing;
- eliminate restrictions on charter school autonomy; and
- repel efforts by charter opponents to roll back chartering in state law.

*(See Appendix A: Where to Go for More Information for a link to a listing of state organizations.)*

Private philanthropic organizations have limitations on their involvement in advocacy work. In particular, they cannot lobby or earmark grant money for lobbying without being liable for a taxable expenditure, though they can fund some organizations and projects that include lobbying as part of their work. Several philanthropies have funded the work of state-level charter support and advocacy organizations, such as the **California Charter Schools Association**, which serves as a strong statewide voice for charter schools. The Chicago-based **Joyce Foundation** provided the **Illinois Network of Charter Schools** a \$300,000 grant over two years to support the development and dissemination of information about Illinois' charter schools to key public and policymaker audiences.

Corporations and philanthropic organizations can also sponsor educational sessions for policymakers on the potential role and benefits of charter schools. For example, the **Gates Family Foundation** of Colorado (not affiliated

with the Bill & Melinda Gates Foundation) invested \$10,000 more than a decade ago in a one-day conference that brought in key players involved in the establishment of the Minnesota and California charter laws. According to one person from the foundation, that conference “lit a fire under several Colorado policymakers and educators.” Within six months, the new charter school bill became law. The foundation went on to provide vital seed funding for the **Colorado League of Charter Schools**, which became a very influential advocate of chartering. Over the years, the league has helped win legislative victories that have expanded facilities financing for charter schools and accomplished other vital goals.

Corporations and philanthropies may also provide legal defense funds against anti-charter efforts. For example, the **California Charter Schools Association** has inspired funding from several donors to support its legal battle to enforce Proposition 39, a measure that entitles charter schools to the use of district-owned buildings. Passed in 2000, the measure requires local school districts to provide charter schools with facilities that are “reasonably equivalent” to those students would be housed in if they were attending traditional district schools. The association has helped its members in several districts obtain “equal treatment” under this law. The **Colorado League of Charter Schools** pioneered the idea of a legal defense fund for charter schools and has advised other associations, including California's, on this strategy.

While there are limits on the types of contributions philanthropies can make to political organizations, corporations and individuals are not limited in this way. Corporations and their executives can support **EdVoice**, for example, a California-based advocacy organization that lobbies for legislation and backs voter initiatives on a range of issues, including charter schools.

In addition, within certain legal restrictions, corporations and their employees can back specific candidates for office, either directly or through political action committees. In most states with strong charter laws, this kind of direct political funding has been invaluable in creating an environment in which chartering can flourish.

In addition to funding charter advocates and their organizations, business leaders can work together to directly affect the policy and legislative environments. Recently in Massachusetts, 37 corporate leaders organized the **Massachusetts Business Leaders for Charter Public Schools** to serve as a business voice in support of charter schools, speak out on behalf of charter-friendly legislation, and build momentum behind charter bills that can stagnate in the state legislature. In September 2007, members of the group testified to state legislators in support of bills that proposed removing charter caps in communities with low-income, minority populations and in areas where the district schools have been state-identified as underperforming.

### Supporting Nationwide Information and Advocacy Work

Though state-level work is central in advocacy efforts, there are critical roles for national organizations as well. Many issues are common from state to state, and national organizations are in a position to gather and disseminate information about them to state-based advocates. Though the federal role in charter policy is relatively small, significant legislative and administrative issues in Washington affect charter schools. Although the definition of public schools in many federal education laws, including **No Child Left Behind** (NCLB), encompasses charter schools, definitions in other parts of federal law do not. Many questions about the law's greater impact on charter schools remain unanswered, including how charter

schools fit into federal special education law and NCLB requirements for highly qualified teachers. Furthermore, the accountability provisions of NCLB have gone into effect in many states, triggering options to restructure failing district schools as charters—territory that is still largely unexplored. There remains a great need for a national presence on behalf of chartering to inform these and many other issues.

Funders have helped numerous national organizations with this kind of work. For example, the **National Alliance for Public Charter Schools** works with support from several donors to increase public support and political understanding of charter schools on a national level by helping to ensure that parents, the media, and policymakers see chartering as a continuous-improvement model for delivering public education.

The **New York City Partnership** and **Chamber of Commerce**, which represent both the local business community and the major corporations headquartered in the city, played a key role in the emergence of the statewide charter law—first by publishing a study of the school system's governance that called for more school-level autonomy, and then by mobilizing the business community when legislation was proposed.

Paul Guzzi, CEO of the **Greater Boston Chamber of Commerce**, is a member of Massachusetts Business Leaders for Charter Public Schools, and his organization has long been a vocal supporter of charter schools. He has spoken out in support of charter-friendly legislation (and against legislation designed to restrict chartering) and highlighted the charter support efforts among its membership through the Chamber's communications.

These organizations work primarily at the state level, but as national entities they have access

to a wider range of donors and expertise and can channel resources to places that need them most. That imperative, combined with the growing number of national issues and the strength of the charter sector's national opponents, suggests that more effective national advocacy is a must.

### ***Action Steps: Forging Charter-Friendly Public Policies***

- Speak up for strong charter laws when interacting with other business leaders and policymakers.
- Lobby on behalf of charter-friendly policies, directly or through your chamber.
- Make a grant to a community organization to build awareness and support of charter schools.
- Make a grant to a city or statewide charter support organization to advocate for better policies.
- Make a grant to a national charter advocacy organization to promote better policies.





## Chapter 6:

### The Next Phase of Business Support

As independent public schools, charter schools rely on relationships with businesses, the community, and philanthropists to provide adequate facilities and rich programs to their students. Independence from a district central office can promote flexibility and innovation, but it can also create challenges in financial planning, legal counsel, school-business partnerships, special education, and other resources typically provided or overseen by a school district central office.

Business leaders who support charter schools stress that involvement in independent public charter schools is a win-win situation. Charters can benefit from the myriad talents, skills, and resources of the business community to supplement their quality education programs, while businesses benefit from building community relationships, providing meaningful volunteer programs for employees, and building the local pool of highly qualified young people that will strengthen the community and create a better environment for businesses and their employees.

*As independent public schools, charter schools rely on relationships with businesses, the community, and philanthropists to provide adequate facilities and rich programs to their students.*

The charter sector has become far more sophisticated in the past several years, and today's business leaders are well poised to guide and support high-quality expansion and innovation in the next phase. The examples that follow show how a comprehensive approach to charter school formation and improvement by the business community can yield positive results.

### **How Can Business Leaders Support the Charter Sector?**

Support from the business community can be integral to the success of charter schools because executives can share skills and expertise that are vital to running the schools' business aspects, including the following:

- Data analysis
- Financial planning
- Human resource management
- Legal counsel
- Performance management
- Real estate development
- Strategic planning
- Technical expertise

Almost universally, the leaders we spoke with in compiling this report emphasize the importance of drawing additional corporate supporters to the charter sector. No one can quantify precisely what it would cost to grow the sector from its current size to its potential scale, but the price tag would surely reach into the hundreds of millions. Each business that supports charter schools locally, at the state level, or on a national scale can help these schools reach their potential scale and bring proven programs to more students.





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## Putting It All Together

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Several state associations, including the California Charter Schools Association, have developed programs to pursue all five approaches to supporting quality charter schools. In several cities, foundations and businesses have pooled resources to pursue these approaches. In New Orleans, multiple funders are working to improve the quality of education post-Katrina, primarily through an intermediary organization, New Schools for New Orleans. In Memphis, TN, one funder—The Hyde Family Foundations—has been especially active through multiple channels.

### *Greater New Orleans, Louisiana*

- **Supply:** With support from several national and local philanthropies, New Schools for New Orleans (NSNO) provides incubating and planning grants and assistance to help promising charter schools open and replicate in New Orleans.
- **Human capital:** NSNO is supporting human capital development in the city's schools by recruiting outstanding teachers and leaders, and by partnering with TeachNOLA and New Leaders for New Schools to address urgent talent and capacity needs.
- **Operational challenges:** Donor support allows NSNO to provide new charter founders with leadership training, operational assistance, legal assistance, board development consulting, and charter application review. Operating schools receive support on day-to-day commercial legal needs through NSNO's pro bono attorney project.
- **Improving quality:** NSNO serves as a clearinghouse of support for school operators, providing ongoing support in human capital, education quality, and school investment resources.
- **Policy environment:** NSNO serves as a voice for charter schools in New Orleans, and advocates on their behalf on the community, district, and state levels. NSNO sponsors public and parent information initiatives to share information about public charter schools in the city.

### *The Hyde Family Foundations – Memphis, Tennessee*

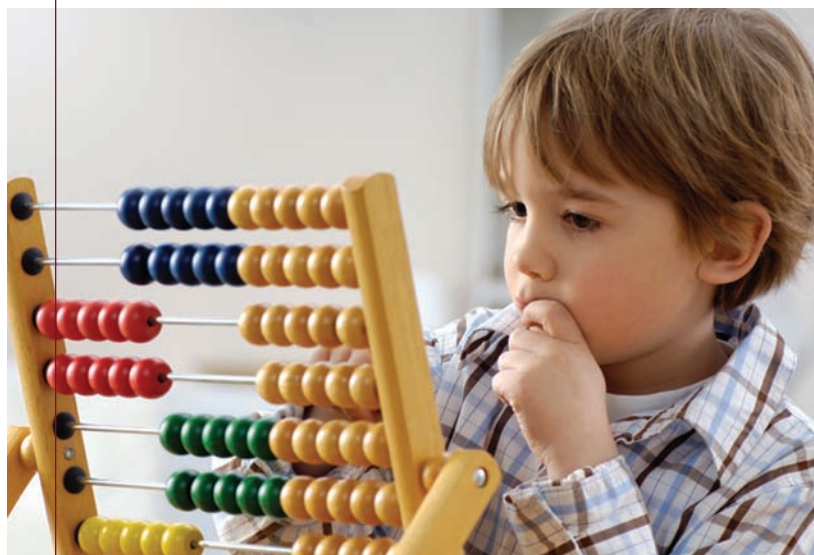
Endowed by the founder of AutoZone and other Hyde family members, the Hyde Family Foundations have invested in quality chartering in Memphis through many channels:

- **Supply:** The foundations direct grants and hands-on assistance to prospective charter schools in Memphis that show promise.
  - **Human capital:** The foundations help New Leaders for New Schools to recruit and train principals for charter and district schools in Memphis.
  - **Operational challenges:** The foundations convened the city's banking and finance leaders to address facilities needs of charter schools; in addition, they provide statewide support for technical assistance activities of the Charter School Resource Center of Tennessee.
  - **Improving quality:** The foundations fund a large-scale university research project that will examine the effectiveness of charter schools in Memphis, and provide support for Memphis's sole authorizer, the school district, to receive training and support from NACSA on the development of its authorizing systems.
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# Promising Practices

by Corporations and Foundations in Support of Charter Schools

*Walton makes \$10,000 grants to help groups develop business plans for new schools, and an additional \$10,000 to help them write the charter proposals required by most charter school authorizers.*



## Support for Individual Schools

- **Achievement First** (AF) is a CMO that operates a growing network of charter schools in Connecticut and New York. AF was founded in 2003 by the leaders of Amistad Academy, a nationally acclaimed charter school in New Haven, CT. In the fall of 2008, the Achievement First network included 15 schools in three cities serving more than 2,500 students in grades K–10.
- The **Walton Family Foundation** has made many contributions to the development of the charter sector, but one of its most wide-reaching and best known strategies is direct grants to charter schools for planning, start-up, and early implementation. Walton makes \$10,000 grants to help groups develop business plans for new schools, and an additional \$10,000 to help them write the charter proposals required by most charter school authorizers. Schools can receive \$30,000 more to keep planning while they negotiate their charters, and then

\$200,000 to start operations. To maximize its impact, the foundation targets certain states and cities where charter schools have the potential to achieve significant market share. To receive initial funding, schools must meet a rigorous set of criteria. Subsequent grants are contingent on achieving ambitious performance goals.

- The **Beginning with Children Foundation** is the organizational partner of two charter schools in Brooklyn, NY. The first, Beginning with Children Charter School, was founded in 1992 as an innovative public school and converted to charter status when New York state passed its charter law in 2001. The second, Community Partnership Charter School, opened in 2000. The foundation, founded by Joe and Carol Reich in 1989, has been at the forefront of the charter school movement in New York and has invested roughly \$4 million in its two partner schools since they opened with the goal of providing a high-quality education to children in Brooklyn and effecting positive change in the broader public school system.

## Support for Brands and Intermediaries

- Two venture philanthropy funds, the **NewSchools Venture Fund** and the **Charter School Growth Fund** (CSGF), funnel a significant amount of philanthropic dollars to new and existing charter school networks. Both work specifically to develop and support promising networks of high-quality charter schools and apply a rigorous due-diligence process as they select would-be CMOs. Promising candidates receive intensive early-stage support, and those that make good progress are eligible for larger grants. As CMOs operate more schools, CSGF and NewSchools expect that public revenues will replace philanthropy, but their initial capital

aims to enable CMOs to invest in quality and scale from the outset.

- Since its founding in 1988, the **NewSchools Venture Fund** has made grants to more than 25 school support organizations, human capital providers, and CMOs. NewSchools' CMO grantees include the following charter brands (with the states in which they operate):

Achievement First (Connecticut and New York)  
Alliance for College-Ready Public Schools (Los Angeles)  
Aspire Public Schools (California)  
DC PREP (District of Columbia)  
Education for Change (Oakland, CA)  
Friendship Public Charter Schools (District of Columbia)  
Green Dot Public Schools (Los Angeles, New York City)  
High Tech High (California)  
Inner City Educational Foundation (California)  
KIPP DC (District of Columbia)  
Leadership Public Schools (California)  
LearnNow (acquired in 2001 by Edison Schools, which operates in many states)  
Lighthouse Academies (District of Columbia, Illinois, Indiana, New York, Ohio)  
Mastery Charter Schools (Philadelphia)  
Noble Network of Charter Schools (Chicago)  
Partnerships to Uplift Communities (Los Angeles and San Fernando, CA)  
Perspectives Charter Schools (Chicago)  
Uncommon Schools (New Jersey and New York)

- The **Charter School Growth Fund** was founded in 2005 to support the development and expansion of CMOs. With a pool of \$100 million, the Charter School Growth Fund expects to create 100,000 new, permanent

seats for underserved families in high-quality charter schools by 2015. The CSGF's CMO grantees include:

Cesar Chavez School Network (Pueblo, CO)  
Great Hearts Academies (Phoenix, AZ)  
IDEA Public Schools (Texas)  
KIPP (nationwide)  
Mastery Learning Institute (Oregon)  
New City Public Schools (Long Beach and Los Angeles, CA)  
Noble Network of Schools (Chicago)  
Uncommon Schools (New Jersey and New York)  
YES Prep Public Schools (Houston)

- **NewSchools** and **CSGF** are donors in their own right, but they are fueled by philanthropic contributions. The **Bill & Melinda Gates Foundation** is the largest funder of NewSchools' CMO work. The **Walton Foundation** and the **Doris & Donald Fisher Fund** have been instrumental in CSGF's growth.

- In addition to nonprofit brands, many for-profit education management organizations (EMOs) run charter schools in the United States. The five largest EMOs by number of charter schools managed are:

Edison Schools (nationwide)  
National Heritage Academies (Colorado, Indiana, Michigan, North Carolina, New York, Ohio)  
The Leona Group (Arizona, Florida, Indiana, Louisiana, Michigan, Ohio)  
Mosaica Education (Arizona, Colorado, Georgia, Illinois, Indiana, Michigan, Ohio, Pennsylvania, and the District of Columbia)  
White Hat Management (HOPE Academies in Ohio)

- **New Schools for New Orleans (NSNO)**

started after the New Orleans public school system was devastated by Hurricane Katrina. When the city and state's school leadership decided to use chartering authority to reopen schools quickly, it created a significant need to recruit, train, and support charter school founders. Through its incubation program, NSNO recruits and selects founders to launch new and replicated schools in New Orleans, and provides extensive financial and operational support to help them prepare for opening day. NSNO provides \$10,000 a month for 10 months to founding leaders, as well as significant technical and networking assistance. The goal of the program is to ensure that new charter schools begin the academic year with well-planned academic programs and competent operational infrastructure in place.

## New School Leaders

- **New Leaders for New Schools (NLNS)** is a national nonprofit organization that works to attract, prepare, and support a new generation of outstanding principals. The program combines an intensive summer training institute focused on management and instructional leadership strategies and a year-long, full-time medical-style residency alongside a successful school principal. In 2007, New Leaders worked with districts in New York City, Chicago, Memphis, Oakland, New Orleans, Baltimore, and the District of Columbia. Though New Leaders prepares principals for all kinds of urban schools, charter school leadership has always been an important focus of the program. Many philanthropic organizations, including the **Eli and Edythe Broad Foundation**, have contributed to New Leaders, and some, including the **Joyce Foundation**, have earmarked their dollars specifically

to support charter school leaders through NLNS.

- **Building Excellent Schools Fellowship** (BES), founded with support from the **Walton Family Foundation**, is a yearlong leadership fellowship that specifically targets individuals who aim to start charter schools. It provides an intensive two-month institute, assistance in navigating the charter application process, a residency at a charter school, and assistance in implementing the charter or receiving placement at an existing charter school. In 2007, BES had trained new leaders to serve in 23 charter schools across the country.
- **The Mind Trust** is a nonprofit organization based in Indianapolis whose mission is to attract, support, and empower the nation's most effective and promising education entrepreneurs to start and expand their ventures within the city. Through its Education Entrepreneur Fellowship, the Mind Trust provides fellows with two years of full-time pay, seed funding, and links to the expertise and community partnerships to help them launch new education initiatives, including charter schools. The **Fairbanks Foundation** provided \$1.6 million in critical start-up funding for the Mind Trust as well as an additional \$1.5 million for core operational expenses through 2010. Several other local and national foundations have invested in the Mind Trust programs.
- With support from the **Robin Hood Foundation**, for example, a group of charter management organizations (CMOs) in New York City—including **KIPP**, **Achievement First**, and **Uncommon Schools**—have formed **TeacherYOU** in collaboration with **Hunter College** to design a new master's program that will prepare teachers according to their demanding standards. The partnership will

use Hunter's existing license from the state to certify and train teachers initially to work in the partners' charter schools, possibly expanding later to serve other schools.

## Facilities Financing and Development

- The pharmaceutical company **Pfizer** rents its former headquarters for one dollar a year to the Beginning with Children Foundation in Brooklyn, NY, as a facility for the foundation's partner charter school.
- The Chicago office of **Ernst & Young**—one of the world's leading professional services organizations—worked with Perspectives Charter School to replicate its original school model. Ernst & Young—
  - helped the founders assess facilities options and identify a building,
  - provided start-up funds to secure and prepare the building for opening, and
  - pledged an annual grant for the first five years to establish the new campus program.
- **Prudential Financial**, based in New Jersey, has provided charter school financing through its Social Investment Program since 1997. Prudential provides short-term working capital financing that is usually paid off within a year, enabling schools to cover a variety of operating and facility expenses. Prudential also provides long-term facility financing on flexible terms that enable schools to improve their physical environment, establish a stronger credit history, and eventually access financing from more conservative lenders. In certain cases, financing is provided before the first student walks through the door. Prudential recognizes that the risk level may seem very high for an unproven school, but it has found that by investing in new schools using proven programs (like KIPP) and supporting some promising, innovative



programs, the risk is not as great as it initially appears. In the past decade, Prudential has provided 117 loans for a total of \$130 million dollars (one-third of which were short-term working capital loans) to charter schools nationally, with a concentration in New Jersey and California.

- In the District of Columbia, the leading student lending organization **Sallie Mae** funded the development of **Building Hope**, a nonprofit organization that finances facilities in urban areas nationwide. Sallie Mae leveraged a one-time gain of \$28 million from the sale of some of the company's office space to fund the organization. The **Walton Family Foundation** came in as a funder to expand Building Hope's work. Building Hope provides the following:
  - Facilities financing at favorable rates
  - Incubation services that create temporary facilities for schools in their first years of operation
  - Training to help charter leaders develop business expertise and understand how to package their school when seeking loans
  - Connections to architects and real estate consultants to help schools build facilities.
- Since its inception in 2003, **Building Hope** has provided more than 20 loan and lease guarantees in excess of \$20 million supporting financing transactions in excess of \$170 million. This financing has developed more than 450,000 square feet of schools, opened 4,400 new student seats, and provided technical and financing assistance to 50 charter schools.
- The **Carl C. Icahn** Charter School in the South Bronx, NY, was opened thanks to Icahn's **Foundation for a Greater Opportunity**, which purchased a building and leased it to the school at a comfortable rate. By making a real estate investment that offers facilities to the school at a rate the school's board could not obtain on its own, the foundation enabled the school's leaders and teachers to focus on maximizing its academic program. In 2006–07, 100% of the school's third and sixth graders were rated proficient or higher on math assessments.
- With support from the **Walton Family Foundation** and **Prudential Financial**, the **Local Initiatives Support Corporation** (LISC) provides facilities financing for charter schools throughout the country. Through its Educational Facilities Loan & Guaranty Fund, the LISC's Educational Facilities Financing Center works to develop and expand local educational facilities funds across the country. Walton's funding has taken the form of both program-related investments and grant money for operations. LISC has invested in local funds in Indianapolis, Los Angeles, Massachusetts, upstate New York, and southwestern Pennsylvania, along with the national network of **KIPP** schools.
- The **Charter School Growth Fund** (CSGF) has also assembled a fund to offer its CMO grantees short- and medium-term financing for facilities, to allow them to grow their networks of schools without scrambling for facilities. Once the CMO's schools have a record of achievement and more stability, CSGF will assist its grantees in finding more permanent financing, such as bonds or traditional loans, which will allow them to pay off their CSGF loans. Those funds will then recycle back to the CSGF to be used for another CMO.
- **Civic Builders**, a nonprofit facilities developer based in New York City, serves the development intermediary role in the charter schools facilities challenge. While most intermediaries provide or guarantee loans

for charter schools to make financing more affordable, Civic Builders finds and purchases or leases buildings itself and refurbishes them as schools. It then leases or subleases its buildings at affordable rates to charter schools. With support from **NewSchools Venture Fund**, the **Eli and Edythe Broad Foundation**, the **Michael & Susan Dell Foundation**, and the **Annie E. Casey Foundation**, among others, Civic Builders allows charter schools to focus on their academic programs rather than real estate.

## Enhancing School Programs

- **Textron** and other Providence, RI, businesses provide job internships to students at **Textron/Chamber of Commerce School**. In addition to their academic programs, students work at local businesses earning a paycheck, developing strong work skills and habits, and preparing for entry into the world beyond school. Most important, the students benefit from the mentoring relationships they develop with their internship supervisors.
- **Ernst & Young** has developed a close partnership with **Perspectives-Calumet Charter School** through mentoring relationships, internships, book drives, and volunteer work days that enrich the school's program and atmosphere. In addition, Ernst & Young has taken the initiative to coordinate student internships at a local sailing club and student participation in a month-long African archaeological dig conducted by the Field Museum. Ernst & Young also launched a formal one-on-one mentoring program with 40 Perspectives-Calumet students that gives participants a valuable opportunity to develop a rewarding mentor-mentee relationships. Finally, Ernst & Young employees have made significant financial and gift contributions to the school, including purchasing new school uniform sweaters for all 300 students, adopting 20 Perspectives families in need during the holiday season, and donating more than \$180,000 to the school through the United Way campaign. These donations and skills-based volunteer programs can help pave the path to college access for students in underserved communities.
- **DuPont, Verizon, Christiana Care, Connectiv, AstraZeneca, and Hercules** provide various supports for the science and technology mission of Charter School of Wilmington. Employees of these companies provide lunch seminars about science and technology topics, mentor juniors and seniors through their science projects, loan technical equipment for experiments, and judge science fairs. Board member John Pierce of DuPont stressed that involving real-world scientific professionals in the program brings more depth to the student experience.
- **LEAD for Charters** is a three-year initiative, funded by a partnership among **LarsonAllen, Nonprofits Assistance Fund**, and the **Cargill Foundation**, to assist Minneapolis-area charter schools in building strong management and business practices. Recognizing the link between strong business practices and educational excellence, LEAD for Charters works with school leaders through peer learning, one-on-one coaching, and direct technical assistance.
- **El Paso Corporation**, a natural gas and energy company, recently partnered with KIPP to develop science labs on KIPP campuses. The first lab will focus on robotics, and the company intends to fund future science labs. El Paso recognizes the importance of a strong science education in its field and hopes that, through its efforts, more students will pursue careers in the applied sciences.

To learn about more ways corporations are involved with charter schools, visit the University of Wisconsin–Madison’s Center on Education and Work Web site on Charter High Schools and Real-World Practices at [www.cew.wisc.edu/charterschools](http://www.cew.wisc.edu/charterschools).

## Collecting and Disseminating Data and Research on Charter Schools

- The **Walton Family Foundation** is very explicit in its definition of quality for its charter grantees: The schools must demonstrate dramatic improvements in student achievement on standardized tests in math and reading. To help its schools collect and analyze performance data, the foundation absorbs the direct costs to its schools of implementing a student information system that facilitates easy, quick data exchange across applications and schools.
- **New Schools for New Orleans** sponsors public and parent information initiatives, including print and online versions of the New Orleans **Parents’ Guide to Public Schools**, which help ensure that parents and community members understand the charter model and are aware of the educational options available to their students. NSNO also sponsored several radio advertisements to spread the word about charter schools, and helped create a local office dedicated to providing parents with tools and information that allow them to advocate for themselves when choosing a school.
- The **Black Alliance for Educational Options** (BAEO) is a national organization with local affiliates in many cities and states. BAEO and its local offices exist to educate black families by providing them with information about their schooling options and to advocate for

expansion of choices. Using cutting-edge media as well as old-fashioned organizing, BAEO is attempting to tap into and build community-based support for school choice policies.

- The **Boston Charter Alliance** was formed with \$50,000 of initial support from the Boston Foundation in the summer of 2006 to inspire and organize parents in support of charter schools. Member schools also contribute between \$2,500 and \$4,000 to support a full-time staff member who is held accountable to specific goals and results, such as the number of parents who write elected officials on behalf of their charter school. This effort was duplicated by a second group of charter schools in Boston in 2007.
- **Families That Can** (FTC), a new Los Angeles-based charter parent advocacy organization, focuses on organizing parent voices around issues like charter funding and facilities equity. By organizing concerned parents, FTC hopes to catalyze change in public education throughout California.

## Supporting Nationwide Information and Advocacy Work

- **Democrats for Education Reform**, launched in 2007, is a lobbying, funding, and advocacy group that supports high standards, innovation, and accountability in education, including charter schools. In addition to national lobbying in support of reform-minded Democratic candidates, the group plans to advocate on behalf of charter schools both in New York State and nationally.
- **All Children Matter** works nationally to elect public officials who support school

choice and education reform. Though the organization is better known for its support of private school choice, the candidates it backs tend to support chartering as well.

### Supporting State-Level Organizations That Advocate for Strong Charter Policies

- Unlike other cities where education reform efforts focus on improving existing systems, post-Katrina New Orleans represents an opportunity to build a school system essentially from scratch. This provides a perfect case study, as local and national foundations collaborate to bring the school system back online as soon as possible to support the city's new charter school sector. Before the 2005 storm, charter schools accounted for only seven of New Orleans' 126 public schools. By spring 2007, 31 of 56 operating schools were charters, and charter schools held a 57% market share of Orleans Parish students.
- In Newark, New Jersey, seven charitable foundations, led by the **Bill & Melinda Gates Foundation**, the **Doris and Donald Fisher Fund**, **The Robertson Foundation**, and **The Walton Family Foundation**, have pledged \$19 million to create the **Newark Charter School Fund**, a nonprofit organization that makes grants to support quality and sustainability in all of Newark's public charter schools. The Newark Charter School Fund seeks to extend the impact of high-performing charter schools and to support underperforming charters' plans to improve student performance.
- In Houston, the **KIPP** and **YES Prep** charter networks have combined forces to press for significant market share and have plans to grow to 42 schools over the next 10 years, serving nearly 15% of Houston students. The expansion has inspired more than \$90 million in philanthropic support from a large group of donors, some of whom are based in Texas and others who are keeping their eye on the Houston experiment.
- In Albany, New York, charter schools enrolled approximately 20% of all public school students in 2007. As part of the **Brighter Choice Public School Choice Project**, the **Brighter Choice Foundation** and its partners anticipate that charter schools will attain a 25% market share of Albany's students within the next one to two years.



# Appendix A



*The Institute for a Competitive Workforce promotes high educational standards and effective workforce training systems so that they are aligned with each other and with today's rigorous business demands.*

## Where to Go for More Information

The **Institute for a Competitive Workforce (ICW)** is a 501(c)3 affiliate of the U.S. Chamber of Commerce that works to ensure that businesses have access, today and tomorrow, to an educated and skilled workforce. Through policy initiatives, business outreach, and a strong grassroots network, ICW finds solutions that will preserve the American workforce as this country's greatest business asset and its strongest resource.

**Mission:** The Institute for a Competitive Workforce promotes high educational standards and effective workforce training systems so that they are aligned with each other and with today's rigorous business demands. For more information, please contact us at [www.uschamber.com/icw](http://www.uschamber.com/icw) or at 202-463-5525.

For more information on charter schools generally, see the U.S. charter schools Web site at [www.uscharterschools.org](http://www.uscharterschools.org).

For more on charter school performance, see [www.charterschoolratings.org](http://www.charterschoolratings.org) or [www.greatschools.net](http://www.greatschools.net).



For contact information on organizations providing technical assistance to charter schools and charter school advocacy in particular states, see [www.publiccharters.org/section/states](http://www.publiccharters.org/section/states). This Web site also includes links to recent publications about charter schools.

The University of Wisconsin–Madison’s Center on Education and Work has developed a Web site on Charter High Schools and Real-World Practices to highlight several successful charter-business relationships that place learning in a real-world context. [www.cew.wisc.edu/charterschools/](http://www.cew.wisc.edu/charterschools/)

The following lists provide contact information for the projects and funders referenced in the text.

### Projects referenced in this report

#### **Achievement First**

[www.achievementfirst.org](http://www.achievementfirst.org)

#### **All Children Matter**

[www.allchildrenmatter.org](http://www.allchildrenmatter.org)

#### **Alliance for College-Ready Public Schools**

[www.laalliance.org](http://www.laalliance.org)

#### **Aspire Public Schools**

[www.aspirepublicschools.org](http://www.aspirepublicschools.org)

#### **Black Alliance for Educational Options**

[www.baeo.org](http://www.baeo.org)

#### **Boston Charter Alliance**

#### **Boston Renaissance Charter Public School**

<http://www.bostonrenaissance.org>

#### **Brighter Choice Charter School**

[www.brighterchoice.org](http://www.brighterchoice.org)

#### **Brighter Choice Project**

[www.brighterchoiceproject.org](http://www.brighterchoiceproject.org)

#### **Broad Residency in Urban Education**

[www.broadresidency.org](http://www.broadresidency.org)

#### **Building Excellent Schools Fellowship**

[www.buildingexcellentschools.org](http://www.buildingexcellentschools.org)

#### **Building Hope (includes America’s Charter)**

[www.buildinghope.org](http://www.buildinghope.org)

#### **California Charter Schools Association**

[www.myschool.org](http://www.myschool.org)

#### **Carl C. Icahn Charter School**

[www.ccics.org](http://www.ccics.org)

#### **Center for Community Self-Help**

[www.self-help.org](http://www.self-help.org)

#### **Center for Education Reform**

[www.edreform.com](http://www.edreform.com)

#### **Center for Research on Education Outcomes**

<http://credo.stanford.edu>

#### **The Center for School Change**

[www.centerforschoolchange.org](http://www.centerforschoolchange.org)

#### **Cesar Chavez School Network**

[www.ccschoolnetwork.org](http://www.ccschoolnetwork.org)

#### **Charter School Growth Fund**

[www.chartergrowthfund.org](http://www.chartergrowthfund.org)

#### **Charter School of Wilmington**

[www.charterschool.org](http://www.charterschool.org)

#### **Charter Schools Development Corporation**

[www.csdc.org](http://www.csdc.org)

#### **Civic Builders**

[www.civicbuilders.org](http://www.civicbuilders.org)

#### **Colorado League of Charter Schools**

[www.coloradoleague.org](http://www.coloradoleague.org)

**Community Loan Fund of New Jersey  
(New Jersey Community Capital)**  
<http://www.newjerseycommunitycapital.org>

**Connecticut Coalition for Achievement Now**  
[www.conncan.org](http://www.conncan.org)

**Credit Enhancement Program of the  
U.S. Department of Education**  
[www.ed.gov/programs/charterfacilities/index.html](http://www.ed.gov/programs/charterfacilities/index.html)

**DC PREP**  
[www.dcprep.org](http://www.dcprep.org)

**Democrats for Education Reform**  
[www.dfer.org](http://www.dfer.org)

**District of Columbia Charter School  
Special Education Cooperative**  
[www.specialedcoop.org](http://www.specialedcoop.org)

**EdBuild**  
[www.edbuild.org](http://www.edbuild.org)

**Edison Schools**  
[www.edisonschools.com](http://www.edisonschools.com)

**Education Sector**  
[www.educationsector.org](http://www.educationsector.org)

**Education/Evolving**  
[www.educationevolving.org](http://www.educationevolving.org)  
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**EdVoice Foundations, Inc.**  
[www.edvoice.org](http://www.edvoice.org)

**Families That Can**  
[www.familiesthatcan.org](http://www.familiesthatcan.org)

**Franklin Academy**  
[www.franklinacademy.org](http://www.franklinacademy.org)

**Friendship Public Charter Schools**  
[www.friendshipschools.org](http://www.friendshipschools.org)

**Great Hearts Academies**  
[www.greatheartsaz.org](http://www.greatheartsaz.org)

**Green Dot Public Schools**  
[www.greendot.org](http://www.greendot.org)

**Harlem Parents United**

**Henry Ford Academy**  
[www.hfacademy.org](http://www.hfacademy.org)

**High Tech High**  
[www.hightechhigh.org](http://www.hightechhigh.org)

**IBM's Transition to Teaching Initiative**  
[www-01.ibm.com/ibm/transitiontoteaching](http://www-01.ibm.com/ibm/transitiontoteaching)

**IDEA Public Schools**  
[www.ideapublicschools.org](http://www.ideapublicschools.org)

**Illinois Facilities Fund**  
[www.iff.org](http://www.iff.org)

**Illinois Network of Charter Schools**  
[www.incschools.org](http://www.incschools.org)

**Inner City Educational Foundation**  
[www.icefla.org](http://www.icefla.org)

**Innovative Schools Development Corporation**  
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[www.leadps.org](http://www.leadps.org)

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**Lighthouse Academies**

[www.lighthouse-academies.org](http://www.lighthouse-academies.org)

**Local Initiatives Support Corporation**

[www.lisc.org](http://www.lisc.org)

**Low Income Investment Fund**

[www.liifund.org](http://www.liifund.org)

**Mastery Charter Schools**

[www.masterycharter.org](http://www.masterycharter.org)

**Mastery Learning Institute**

<http://home.teleport.com/~carthur/>

**Mosaica Education**

[www.mosaicaeducation.com](http://www.mosaicaeducation.com)

**Michigan Association of Public School Academies**

[www.charterschools.org](http://www.charterschools.org)

**National Alliance for Public Charter Schools**

[www.publiccharters.org](http://www.publiccharters.org)

**National Association of Charter School Authorizers**

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**National Charter School Research Project**

[www.ncsrp.org](http://www.ncsrp.org)

**National Heritage Academies**

<http://heritageacademies.com>

**Newark Charter School Fund**

[www.ncsfund.com](http://www.ncsfund.com)

**New City Public Schools**

[www.thenewcityschool.org](http://www.thenewcityschool.org)

**New Leaders for New Schools**

[www.nlins.org](http://www.nlins.org)

**NewSchools Venture Fund**

[www.newschools.org](http://www.newschools.org)

**New Schools for New Orleans**

<http://newschoolsforneworleans.org>

**New Visions for Public Schools**

[www.newvisions.org](http://www.newvisions.org)

**New York City Center for Charter School Excellence**

[www.nycchartercenter.org](http://www.nycchartercenter.org)

**New York State Charter School Association**

[www.nycsa.org](http://www.nycsa.org)

**New Teacher Project**

[www.tntp.org](http://www.tntp.org)

**Noble Network of Charter Schools**

<http://noblenetworkcmo.org>

**Pacific Charter School Development**

[www.pacificcharter.org](http://www.pacificcharter.org)

**Perspectives Charter Schools**

[www.perspectivescs.org](http://www.perspectivescs.org)

**Progressive Policy Institute**

[www.ppionline.org](http://www.ppionline.org)

**Raza Development Fund**

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**Replications, Inc**  
[www.replications.org](http://www.replications.org)

**Saint Hope Public Schools**  
[www.sthopepublicschools.org](http://www.sthopepublicschools.org)

**Teach for America**  
[www.teachforamerica.org](http://www.teachforamerica.org)

**TeacherYOU**  
[http://depts.washington.edu/jstart/\\_files/TU%202008%20Fellows%20Description.pdf](http://depts.washington.edu/jstart/_files/TU%202008%20Fellows%20Description.pdf)

**TeachNOLA**  
[www.teachnola.org](http://www.teachnola.org)

**Textron/Chamber of Commerce School**  
[www.chamberschool.com](http://www.chamberschool.com)

**The Housing Partnership Network**  
[www.housingpartnership.net](http://www.housingpartnership.net)

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[www.leonagroup.com](http://www.leonagroup.com)

**The Mind Trust**  
[www.themindtrust.org](http://www.themindtrust.org)

**The Reinvestment Fund**  
[www.trfund.com](http://www.trfund.com)

**Uncommon Schools**  
[www.uncommonschools.org](http://www.uncommonschools.org)

**United Federation of Teachers**  
[www.uft.org](http://www.uft.org)

**Victory Schools**  
[www.victoryschools.com](http://www.victoryschools.com)

**White Hat Management (HOPE Academies)**  
[www.whitehatmgmt.com](http://www.whitehatmgmt.com)

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**Cargill Foundation**  
[www.cargill.com/about/citizenship/foundation.htm](http://www.cargill.com/about/citizenship/foundation.htm)

**Christiana Care**  
[www.christianacare.org](http://www.christianacare.org)

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[www.ey.com](http://www.ey.com)

**Fairbanks Foundation**

[www.rmfairbanksfoundation.org](http://www.rmfairbanksfoundation.org)

**Ford Motor Company Fund**

[www.ford.com/our-values/ford-fund-community-service](http://www.ford.com/our-values/ford-fund-community-service)

**Gates Family Foundation**

[www.gatesfamilyfoundation.org](http://www.gatesfamilyfoundation.org)

**Greater New Orleans Foundation**

[www.gnof.org](http://www.gnof.org)

**Greater Boston Chamber of Commerce**

[www.bostonchamber.com](http://www.bostonchamber.com)

**Hercules**

[www.herc.com](http://www.herc.com)

**Holland & Knight**

[www.hklaw.com](http://www.hklaw.com)

**Houston Endowment Inc.**

[www.houstonendowment.org](http://www.houstonendowment.org)

**Irvine Foundation**

[www.irvine.org](http://www.irvine.org)

**Joyce Foundation**

[www.joycefdn.org](http://www.joycefdn.org)

**LarsonAllen**

[www.larsonallen.com](http://www.larsonallen.com)

**Massachusetts Charter Public School Association**

[www.masscharterschools.org/index.html](http://www.masscharterschools.org/index.html)

**Michael & Susan Dell Foundation**

[www.msdf.org](http://www.msdf.org)

**Motorola**

[www.motorola.com](http://www.motorola.com)

**Nonprofits Assistance Fund**

[www.nonprofitsassistancefund.org](http://www.nonprofitsassistancefund.org)

**Packard Humanities Institute**

[www.packhum.org](http://www.packhum.org)

**Philanthropy Roundtable**

[www.philanthropyroundtable.org](http://www.philanthropyroundtable.org)

**Pfizer**

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[www.prudential.com](http://www.prudential.com)

**Pumpkin Foundation****Robin Hood Foundation**

[www.robinhood.org](http://www.robinhood.org)

**Rodel Foundation of Delaware**

[www.rodelfoundationde.org](http://www.rodelfoundationde.org)

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[www.rmsff.org](http://www.rmsff.org)

**Sallie Mae Corporation**

[www.salliemae.com](http://www.salliemae.com)

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[http://depts.washington.edu/jstart/\\_files/TU%202008%20Fellows%20Description.pdf](http://depts.washington.edu/jstart/_files/TU%202008%20Fellows%20Description.pdf)

**Textron**

[www.textron.com](http://www.textron.com)

**The Henry Ford Museum**

[www.hfmgv.org](http://www.hfmgv.org)

**The Hyde Family Foundations**

[www.hydefamilyfoundations.org](http://www.hydefamilyfoundations.org)

**Thomas B. Fordham Institute**

[www.fordhamfoundation.org](http://www.fordhamfoundation.org)

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[www.tigerfoundation.org](http://www.tigerfoundation.org)

**Robertson Foundation**

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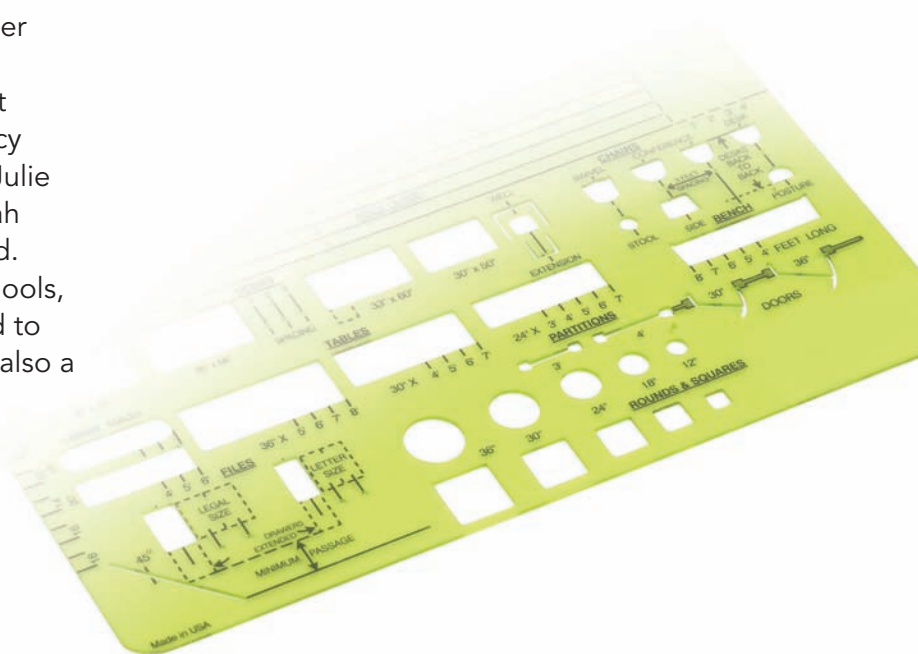
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